UTREx High Level Cheat Sheet

Website: https://utrex.schools.utah.gov

Support: All support and technical questions should be submitted to utrexhelp@schools.utah.gov.

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High Level Process

- 1. **Log into UTREx** via https://utrex.schools.utah.gov. After login, select 'DC' from the dropdown menu. This will open a new window to the DC portal, where you will run your data collection. Log into the DC interface with same user ID and Password you just used.
- 2. **Start a Collection:** Under the Collection Requests tab, UTREx Clearinghouse section, click "Start Collection." Check the box next to your data source under 'SIF Zone' (the top option) and click "Start Data Collection for all items checked below." You can check the collection status on the 'Collection Status' tab.
- 4. **Process level 1 validations:** Once the collection is complete, return to the 'Collection Requests' tab and choose 'Validate.' Check errors by clicking 'View Level 1 Validation Report.'
- 5. **Certify and submit the collection** by clicking 'Certify' on the Report Summary tab. This sends the collection to the greater UTREx Clearinghouse for level 2 validation. (Note that certification of a collection does not mean you need to have a totally clean collection.)
- 6. Check exceptions and run reports in UTREx Clearinghouse portal from the side navigation buttons

Login Tips: -Passwords must be at least 7 characters and must include a capital letter and a number. -Login info is the same for both portals

Flat File Collections: The process detailed above applies to SIF collections. For flat file collections, only step 2 above differs. Start a flat file collection by clicking 'Data Sources' > 'Other Data Sources' > 'Manage' and upload a new flat file. Under the Collection Requests tab, check the 'All UTREx Files' box. **Note:** UTREx will no longer be capable of collecting flat files beginning October 1, 2013.